**BSO Tutorial for Tax Year 2004**

# Create Forms W-2 Online

Contains the following lessons:

- [Create Forms W-2 Online](#)
- [Resume the Creation of Unsubmitted Form W-2s](#)
- [Download Submitted W-2s](#)

# Lesson 1: Create Forms W-2 Online

Follow the instructions below to create up to 20 Forms W-2 online.

**Step 1**:   Point your browser to the Business Services Online Welcome page:
              www.socialsecurity.gov/bso/bsowelcome.htm.

**Step 2**:   Select the **Login** link on the Business Services Online Welcome page. The system
              displays the General Login Attestation page.

**Step 3**:   Select the **I Accept** button (located at the bottom of the page) after reading the
              conditions defined on the General Login Attestation page. The system displays the
              Business Services Online Login page.

**Step 4**:   Enter your PIN and password.

**Step 5**:   Select the **Login** button. The system displays the BSO Home Page. (To return to the
              Business Services Online Welcome page, select the **Cancel** button.)

**Step 6**:   Select the **Enter Forms W-2 for Tax Year 2004** link. The system displays the
              Wage Reporting Attestation page.

**Step 7**:   Select the **I Accept** button after reading the conditions defined on the Wage
              Reporting Attestation page. The system displays the W-2 Online Information for
              Tax Year 2004 page.

NOTE:    If you have any existing unsubmitted reports, the system displays the W-2 Online
         Unsubmitted Reports for Tax Year 2004 page. For TY 2004, you may have a
         maximum of five unsubmitted reports at one time. If there are four or fewer reports,
         you may continue without submitting the existing reports by selecting the **Start a
         New Report** button. Refer to Lesson 2: Resume Unsubmitted W-2s  for more
         information. If you have the maximum of five unsubmitted reports, you must first
         submit an existing report before starting a new one.

**Step 8**:   Select the appropriate response for the FOR WHOM ARE YOU FILING? section after reviewing the Registration Information.

NOTE:   The **FOR WHOM ARE YOU FILING?** radio buttons are not available for self-employed users.

**Step 9**:   Select the **Continue** button after reviewing the Privacy Act and Paperwork Reduction Act notice. The system displays the W-2 Online Employer Data for Tax Year 2004 page. (To return to the BSO Home Page, select the **Cancel** button.)

**Step 10**:   Enter your employer information.

NOTE:   All fields marked with an asterisk (*) must be completed.

**Step 11**:   Select the **Continue** button. The system displays the W-2 Online Form W-2 for Tax Year 2004 page. (To return to the BSO Home Page, select the **Cancel** button.)

**Step 12**:   Enter the W-2 data in the appropriate boxes.

**Step 13**:   Select **New W-2** to save this W-2 information and create another W-2. Select the **Done** button to save this W-2 information and proceed to the W-2 Online Data Review for Tax Year 2004 page. Select the **Cancel** button to delete entries made to this W-2.

NOTE:   You can enter a maximum of 20 W-2s per report. When entering your 20th W-2, the system will no longer display the New W-2 button.

**Step 14**:   After you select New W-2 or Done, you may receive an alert. If so, you will need to review your data and make any corrections or select an override response for each alert. Then, select **Done** or **New W-2** to proceed to the W-2 Online Data Review for Tax Year 2004 page.

**Step 15**: Select the **View/Edit** button next to the appropriate record to view or edit the W-2 data. If you want to delete the W-2 data, select the **Delete** button next to the appropriate record.

**Step 16**: Select one of the following options: **New W-2**, **Edit Employer Info**, **Go to W-3**, **Save and Quit**, or **Quit and Delete**.

**Step 17**: Select the **Go to W-3** button to review your W-3 wage data. The system displays your W-2 Online Form W-3 for Tax Year 2004 for your review.

**Step 18**: Select one of the following options on the W-2c Online Form W-3c:

> **Submit Wage Report** button to submit your wage information. Go to Step 19 for more information.
>
> **Print Wage Report** button to print or preview your wage report prior to submitting it to SSA. Go to Step 23 for more information.
>
> **Return to W-2 Online Data Review Page** button to edit your data. Go to Step 28 for more information.

**Step 19**: Select the **Submit Wage Report** button on the W-2 Online Form W-3 for Tax Year 2004 page. The system submits your W-2/W-3 wage data and displays the W-2 Online Receipt Acknowledgement for Tax Year 2004 page along with the print pop-up window. Select the **OK** button to print the W-2 Online Receipt Acknowledgment page. Otherwise, select the **Cancel** button to close the pop-up window.

**Step 20**: Right-click the file link to save the wage file.

**Step 21**: Select **Save Target As** option from the browser menu to save the file. (Otherwise, select the Continue button.)

NOTE:   Your wage file will be available for you to review under your BSO account until the date displayed on your Receipt Acknowledgement.

**Step 22**:  Select the **Continue** button. The system displays the W-2 Online Thank You page.

**Step 23**:  Select the **Print Wage Report** button on the W-2 Online Form W-3 for Tax Year 2004 page to print the wage report. The system displays the W-2 Online Report Print page.

NOTE:  If you do not have Adobe Acrobat Reader on your computer, you can download it by selecting "<u>follow this link</u>" near the top of the page.

**Step 24**:  Select the **Print Preview** link. The system displays the compiled Forms W-2 and W-3.

**Step 25**:  Select **File>Print** from the menu bar or select the **Print** icon from the tool bar to print your Forms W-2 and W-3.

**Step 26**:  Select **File>Close** on the menu bar after printing to close the window. The system returns you to the Print Preview page.

**Step 27**:  Select the appropriate button on the Print Preview page. There are options on this page that will allow you to submit your wage file to SSA, return to the W-3 page, return to the W-2 Online Data Review page, save your data, or quit and delete your data.

**Step 28**:  Select the **Return to W-2 Online Data Review Page** button on the W-2 Online Form W-3 for Tax Year 2004 page to edit your W-2 data. The system returns you to the W-2 Online Data Review for Tax Year 2004 page.

## Lesson 2: Resume Unsubmitted W-2s

Follow the instructions below to continue working with W-2 Online reports that you have saved but not yet submitted. SSA will delete any saved reports that you do not submit or update within 90 days. All unsubmitted Forms W-2 will be removed on December 31.

NOTE: You may have up to five saved reports. Each report may contain up to 20 Forms W-2. If you have any unsubmitted reports, the system will automatically display the unsubmitted W-2s upon entering W-2 Online.

**Step 1**: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.

**Step 2**: Select the **Login** link on the Business Services Online Welcome page. The system displays the General Login Attestation page.

**Step 3**: Select the **I Accept** button after reading the conditions defined on the General Login Attestation page. The system displays the Business Services Online Login page.

**Step 4**: Enter your PIN and password.

**Step 5**: Select the **Login** button. The system displays the BSO Home Page. (To return to the Business Services Online Welcome page, select the **Cancel** button.)

**Step 6**: Select the **Resume Unsubmitted W-2s** link. The system displays the Wage Reporting Attestation page.

**Step 7**: Select the **I Accept** button after reading the conditions on the Wage Reporting Attestation page. The system displays the W-2 Online Unsubmitted Reports for Tax Year 2004 page.

**Step 8**:  Select the **View/Edit** button for the specific report to view or modify the report. The system displays the W-2 Online Data Review for Tax Year 2004 page. (To delete the report, select the **Delete** button for the specific report.)

NOTE:  The Start a New Report button will not be displayed if you have the maximum number of unsubmitted reports (5). You will have to submit a report for the system to display the **Start a New Report** button.

**Step 9**:  Select the **Go to W-3** button. The system displays the W-2 Online Form W-3 for Tax Year 2004 page. Use the options on this page to submit your wage report, print your wage report, or return to your unsubmitted Form W-2s.

# Lesson 3: Download Submitted W-2s

Follow the instructions below to download an Adobe file containing Forms W-2 and W-3 for a W-2 Online report submitted within the last 30 days.

NOTE:    Submitted wage report files are available for 30 days or until December 31, whichever comes first.

**Step 1**:    Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.

**Step 2**:    Select the **Login** link on the BSO Welcome page. The system displays the General Login Attestation page.

**Step 3**:    Select the **I Accept** button after reading the conditions defined on the General Login Attestation page. The system displays the Business Services Online Login page.

**Step 4**:    Enter your PIN and password.

**Step 5**:    Select the **Login** button. The system displays the BSO Home Page. (To return to the BSO Welcome page, select the **Cancel** button.)

**Step 6**:    Select the **Download Submitted W-2s** link. The system displays the Wage Reporting Attestation page.

**Step 7**:    Select the **I Accept** button after reading the conditions defined on the Wage Reporting Attestation page. The system displays the W-2 Online Download for Tax Year 2004 page with previously submitted wage statements.

**Step 8**:    Right-click the WFID link you wish to download.

**Step 9**:  Select the **Save Target As** option from the browser menu to download the file onto your computer.

NOTE:  Adobe Acrobat Reader is required to view your downloaded wage file. If you do not have Adobe Acrobat Reader on your computer, you can download it by pointing your browser to www.adobe.com.

**Step 10**:  Select the **BSO Home Page** link to return to the BSO Home Page.